



Idaho State Historical Society

Strategic Planning Results

April, 2007

Mission

Idaho State Historical Society preserves and promotes Idaho's cultural heritage

Vision

Our vision is to inspire, enrich and reach out to all Idahoans by leading the state in preserving and sharing our dynamic cultural heritage.

Values

- Professionalism
- Stewardship
- Customer/Consumer
- Education

Goal Categories

1. Training
2. Funding/Growth
3. Communications
4. Customer/Consumer

2006-07 Strategic Planning Process

Background: In November 2006, the Idaho State Historical Society began an agency-wide strategic planning process, under the facilitation of consultant Penelope Schwiebert. This is the first strategic plan undertaken by the agency in at least the last 30 years that has involved all parts of the agency. The process is ongoing. The following summarizes where ISHS is currently (as of April 2007) in its strategic planning process.

Development of Planning Team: ISHS is administratively divided into the following work units: Administration/Fiscal; Public Archives and Research Library; State Historical Museum; State Historic Preservation Office; Historic Sites and Old Idaho Penitentiary; Capitol Restoration Project/Special Projects. The planning team consisted of the administrator of each of those units, along with one other staff member from each unit. In addition, two trustees participated on the team, as did the President of the Friends of the State Historical Museum, and one former trustee.

Staff Participation: All staff have been kept up to date on the planning process through discussions at work unit staff meetings and all-staff meetings. Staff comments from those meetings have been an integral part of the planning team deliberations. Additional staff members will serve on the four goal committees.

Trustee Participation: Two trustees have been a part of the strategic planning team since inception. The strategic plan will be presented to the trustees at their meeting on May 10, 2007.

Brief Summary of ISHS Goals as they Relate to State Board of Education Vision Statement

[Please note that a more complete list of ISHS Goals follows]

Goal 1: Training

Goal Statement: Develop and implement a training program that will allow staff to acquire the skills necessary to achieve our vision.

Relationship of this ISHS Goal to SBOE Vision Statement: This goal fits with many of the SBOE desires to improve Quality, including SBOE emphasis on training, program competitiveness, and high levels of achievement. This goal also fits with SBOE vision of Efficiency, through ongoing monitoring of the training schedule to determine the most efficient and cost-effective way of delivering on-site and external training.

Performance Measure: Assess ISHS staff training needs

Benchmark: June 2007 _____

Performance Measure: Trustees and Executive Director develop a policy addressing training needs and provide authority to allocate resources

Benchmark: Fall 2007 _____

Performance Measure: Assess what training can be done within agency and what must be done externally; identify sources of external training

Benchmark: November 2007 _____

Performance Measure: Schedule approved training as funds and personnel are made available.

Benchmark: April 2008 (ongoing) _____

Adjust or change ineffective training

Benchmark: May 2008 (ongoing) _____

Goal 2: Funding and Growth

Goal Statement: Implement a funding plan for ISHS growth within two years

Relationship of this ISHS Goal to SBOE Vision Statement: This goal does not precisely fit with any of the SBOE vision goals, except in that funding is necessary to achieve any of the ISHS/SBOE goals.

Performance Measure: Convene goal work group made up of representatives from each ISHS work unit; outline needs for each work unit for next two years

Benchmark: August 2007 _____

Performance Measure: Identify major upcoming projects and identify projects that do not have full funding

Benchmark: October 2007 _____

Performance Measure: Compile list of potential funding sources

Benchmark: November 2007 _____

Performance Measure: Identify personnel to assist with funding process; develop funding strategy

Benchmark: December 2007 _____

Performance Measure: Implement the plan

Benchmark: January 2008 (ongoing) _____

Goal 3: Communication

Goal Statement: Implement an internal communications plan by January 2009

Relationship of this ISHS Goal to SBOE Vision Statement: This goal fits with the SBOE goal of **Efficiency**, as the internal communication system for an agency widely scattered geographically is necessary for efficient service.

Performance Measure: Assess staff needs

Benchmark: October 2007 _____

Performance Measure: Identify currently effective internal communication; identify gaps; identify tools to fill those gaps

Benchmark: January 2008 _____

Performance Measure: Develop, review, and produce plan to improve internal communications

Benchmark: January 2009 _____

Goal 4: Customer/Consumer

Goal Statement: Assess needs of Idahoans across the state and modify ISHS services to meet those needs.

Relationship of this ISHS Goal to SBOE Vision Statement: This goal fits with all four of SBOE's goals:

Quality, Access, Relevancy, and Efficiency.

Performance Measure: Identify and profile current and potential customers

Benchmark: August 2007 _____

Performance Measure: Assess customer needs

Benchmark: June 2008 _____

Performance Measure: Examine current services; research ways of offering new services; determine funding needs; develop new services and offerings

Benchmark: April 2009 (ongoing)

Goal Details

Goal Development

Goal 1: Training

Goal Leader (shared) Goal Team:

Milan, Linda, Kurt, Annette

Goal Statement: Develop and implement a training program that will allow staff to acquire the skills necessary to achieve our vision.

Objectives	Tasks	Start Date	Completion Date	Lead/ Others	Cost	Measure	Notes
1.1 Assess training needs and skills on hand	1.1.1 Develop a tool to assess training needs	May 2007	May 2007	team, volunteers	0	was tool developed?	Examples of subject areas: 1) ISHS policies/ procedures; 2) ID history; 3) tech/ prof. development; 4) mentoring; 5) customer service; 6) other (such as grant writing)
	1.1.2 All staff respond to assessment tool as to what of and extent of training is needed	July 2007	July 2007	all staff	0	did all staff respond?	
	1.1.3 Compile results of assessment	Aug 2007	Sept 2007	team	0	results are compiled	
	1.1.4 Trustees & ED develop a policy re: need for training and provide authority to allocate resources	TBD	TBD	trustees, ED	0	Trustees agree and direct ED to allocate resources	
1.2 Develop plan to meet needs from both internal and external sources	1.2.1 Assess what types of training each division can accomplish in-house	Oct 2007	Nov 2007	administrators, team	0	meetings are held; list is compiled	
	1.2.2 Assess what types of training can only be accomplished externally	Oct 2007	Nov 2007	administrators, team	0	meetings are held; list is compiled	
	1.2.3 For training that can only be accomplished externally, identify the appropriate source	Oct 2007	Nov 2007	administrators, team	0	meetings are held, list is compiled	
	1.2.4 Determine time and cost expenditures for each requested training event	Oct 2007	Nov 2007	TBD	0	meetings are held, list is compiled	
	1.2.5 Acquire sufficient	TBD	TBD	trustees, ED, administrators	0	meetings are held,	This is dependent, in part, on annual budget cycle to legislature

	funds to accomplish requested training					funds are identified/acquired	
	1.2.6 Determine acceptable man-hour utilization to accomplish training	Jan 2008 trustee meeting	Jan 2008 trustee meeting	trustees, ED, administrators	0	policy is established	
1.3 Accomplish training	1.3.1 Schedule requested training as funds and personnel are made available	April 2008	ongoing	staff and their supervisor	TBD	training is accomplished	
1.4 Evaluate effectiveness of training	1.4.1 Follow-up with staff and supervisors as to effectiveness of training	May 2008	ongoing	team, staff and their supervisor	0	input is acquired	
	1.4.2 Adjust or change ineffective training	May 2008	ongoing	team, staff and their supervisor	0	changes are made	
	1.4.3 Schedule periodic reassessment of training needs and effectiveness	ongoing	ongoing	team, staff and their supervisor	0		

Goal 2: Funding & Growth**Goal Leader** Jody, Bobbi_ **Goal Team**____ Jody, Bobbi, Keith,

Anne ____

Goal Statement: **Implement a funding plan for ISHS growth within two years**

Objectives	Tasks	Start Date	Completion Date	Lead/ Others	Cost	Measure	Progress	Notes
2.1. Assess current and long-Term funding needs within 6 months	2.1.1 Convene workgroup made up of a person from each workgroup	06/01/07	07/31/07	Keith/Ex Director w/Team & workgroup reps	0	Did we meet?		
	2.1.2 list needs of each division for the next two years	06/01/07	07/31/07	ED Team Reps from each work group	0	Were needs identified		
	2.1.3 identify major projects, big exhibits, digitization, capital needs, Pioneer Village, ongoing programs, building needs, personnel and training	08/01/07	08/31/07	ED Team Reps from each work group	0	Were they identified ?		
	2.1.4 Create report documenting agency needs and major projects.	9/1/07	9/15/07	Lead	0	Was report prepared ?		
2.2 Design and Develop Appropriate Plan (within 1 year)	2.2.1 Identify projects that do not have full funding	09/01/07	9/30/07	ED Team Reps from each work group	0	Was plan developed		
	2.2.2 List potential funding sources (grants, fundraisers, corporations, legislative)	10/01/07	10/31/07		TBD			
	2.2.3 Determine which funding sources are appropriate for which projects and determine and document legal requirements and compliance issues	11/01/07	11/30/07		0			
	2.2.4 Identify personnel and outside help to begin "big picture" funding process	11/01/07	11/30/07		0			
	2.2.5 Market fundraising efforts and share info statewide of needs and funding	12/01/07	12/31/07		TBD			
	2.2.6 Develop legislative strategy for each project as appropriate	12/01/07	12/31/07		0			
2.3 Implement the plan (within 1 year of D&D)	2.3.1	01/01/08	12/31/08		TBD			
2.4 Evaluate and refine the plan (2 years, after 1 year of implementation)		01/01/09	12/31/09		TBD			

Goal 3: Communication **Goal Leader** _Suzi/Ken_____ **Goal Team:** Suzi, Jess, Tom, Ken
Goal Statement: Implement an internal communications plan by January 2009.

Objectives	Tasks	Start Date	End Date	Lead/ Others	Cost	Measure	Progress	Notes
3.1. Design Plan	3.1.1 Select staff to serve on team	July 2007	July 2007	Team	Staff time	List of participants developed		
	3.1.2 Prepare questionnaire for staff needs assessment	July 2007	Sept 2007	Team/Lead	Staff time	Questionnaire developed		
	3.1.3 Conduct staff needs assessment	Oct 2007	Oct 2007	Team	Staff time	Results collected		
	3.1.4 Identify currently effective internal communication	Nov 2007	Dec 2007	Team	Staff time	List of pros developed		
	3.1.5 Identify current gaps in internal communication	Same		Team	Staff time	List of cons developed		
	3.1.6 Identify tools to fill those gaps	Jan 2008	Jan 2008	Team	Staff time	List of tools developed		
3.2 Develop Plan	3.2.1 Develop outline	Jan 2008	May 2008	Team	Staff time	Outline drafted		
	3.2.2 Draft sections			Lead	Staff time	Sections drafted		
	3.2.3 Team review of draft	June 2008	June 2008	Team	Staff time	Comments collected		
	3.2.4 Revise based on team comments	July 2008	July 2008	Lead	Staff time	Revisions completed		
	3.2.5 Director/staff review	Aug 2008	Aug 2008	Team	Staff time	Comments collected		
	3.2.6 Revise based on director/staff comments	Sept 2008	Sept 2008	Lead	Staff time	Revisions completed		
	3.2.7 Team review	Oct 2008	Nov 2008	Team	Staff time	Comments collected.		
	3.2.8 Produce final			Lead	Staff time	Final produced		
	3.2.9.							
3.3 Implement Plan	3.3.1 Director/team present plan	Jan 2009		Team		Meeting held		
	3.3.2. Follow plan				TBD	Communication improved?		
3.4 Evaluate Plan	3.4.1 Resubmit questionnaire to staff	Jan 2010	Jan 2010	Team	Staff time	Comments collected		
	3.4.1 Identify pros and cons of plan			Team	Staff time	List of pros developed		
3.5. Refine Plan	3.5.1. Revise plan based on comments	Feb 2010	May 2010	Lead	Staff time	List of cons developed		
	3.5.2. Re-release plan	July 2010			Staff time/ TBD	Communication improved and institutionalized?		

Goal 4: Customer
Chris, Steve

Goal Leader: Shared

Goal Team: Fred, Rachelle,

Goal Statement: Assess needs of Idahoans across the state and modify ISHS services to meet those needs

Objectives	Tasks	Start Date	Completion Date	Lead/ Others	Cost	Measure	Notes
4.1 Assess customer needs	4.1.1 Identify and profile current and potential (future) external customers	June 1, 2007	July 31, 2007	Rep. from each workgroup/division	TBD		To profile customers and potential customers go to marketing books, Dept. of Commerce, DHR, etc.
	4.1.2 Develop assessment to determine what current and future customers want and need	August 1, 2007	December 31, 2007	Unknown - Rep. from each workgroup/division and/or contractor	TBD		May need to consider contracting this and customer profiling to outside source
	4.1.3 Execute assessment	January 1, 2008	April 30, 2008	Each workgroup will assess its own external customers	TBD (travel, staff time, materials, postage, etc.)		Assessment could be focus groups, surveys, other
	4.1.4 Compile and summarize results	May 1, 2008	May 31, 2008	Rep. from each workgroup/division	\$0 (staff time)		
4.2 Design/redesign services and offerings to meet needs identified in assessment	4.2.1 Study current services and compare to assessment results	June 1, 2008	June 30, 2008	Rep. from each workgroup/division	\$0 (staff time)		This may be where we need to do the Dying Swans matrix.
	4.2.2 Brainstorm/	July 1, 2008	July 31, 2008	Rep. from	\$0 (staff	Do we have new ideas?	

	research new service ideas and offerings (if necessary)	(Depending upon staff schedules we might need to move start of this task to Sept. 2008 thereby pushing everything else back two months)		each workgroup/division	time)		
	4.2.3 Determine how to accomplish new services (keep or get rid of some current services)	August 1, 2008	September 30, 2008	Rep. from each workgroup/division	\$0 (staff time)		
	4.2.4 Consult with funding and growth group to determine available funds for services and offerings	August 1, 2008	September 30, 2008	Rep. from each workgroup/division	\$0 (staff time)		
	4.2.5 Develop services and offerings	October 1, 2008	March 31, 2009	TBD	TBD		
	4.2.6 Finalize services and offerings	April 1, 2009	April 30, 2009	TBD	TBD		
4.3 Implement new/redesigned service offerings	4.3.1 Advertise new/redesigned services	May 1, 2009 (ongoing throughout this timeframe)	April 30, 2011				
	4.3.2 Perform/implement new/redesigned services throughout agency	May 1, 2009 (ongoing throughout this timeframe)	April 30, 2011				
4.4 Evaluate new/redesigned services and offerings	4.4.1 Develop evaluation method for new/redesigned services	May 1, 2011	April 30, 2012				
	4.4.2						

	Determine timeframe for evaluation						
	4.4.3 Evaluate new/redesigned service offerings						
	4.4.4 Compile results of assessment						
	4.4.5 Modify/get rid of offerings that are not working						
4.5 Reassess customer needs	4.5.1 Develop assessment	May 1, 2012	April 30, 2013				
	4.5.2 Execute assessment						
	4.5.3 Compile and summarize results						